

SAMPLE DOCUMENT. "Harborview Consulting" is a fictional 8-person company. This sample shows the planning document every migration client receives and approves *before anything moves*. Real plans are built around your actual mailboxes, hosting, and schedule.

Email Migration Cutover Plan

Harborview Consulting · 8 mailboxes, ~46 GB · Legacy IMAP host → Microsoft 365 · Zero-downtime cutover

Guiding Principles

- **Nothing is deleted from the source until you sign off on the verification report.** The old system stays intact and reachable throughout.
- **Email keeps flowing the entire time.** The migration syncs in the background; the DNS cutover happens at a scheduled low-traffic window.
- **"Zero data loss" is proven, not promised** — per-mailbox, per-folder item counts from the source are compared against the destination before cutover is called complete.
- **Every step below is reversible until Phase 4.** The rollback procedure for each phase is on page 2.

Phases & Timeline

PHASE	WHAT HAPPENS	USER IMPACT	WHEN
0. Inventory	Count and size every mailbox and folder on the source; record DNS state; confirm license plan	None	Day 1
1. Staging	Microsoft 365 tenant configured: users, licenses, security baseline (MFA ready), domain verified alongside existing mail	None	Days 1–2
2. Initial sync	Full mailbox copy via Exchange Online migration batches; continues syncing new mail automatically	None — old system still primary	Days 2–4 (size-dependent)
3. Verification	Item counts compared source vs. destination per folder; discrepancies resolved and re-synced	None	Day 4
4. Cutover	MX/DNS records switched to Microsoft 365 at the agreed window (typically Fri evening); final delta sync	Brief — new mail starts arriving in M365	Day 5, scheduled window
5. Reconnect	Each user connects Outlook/phone using the provided step-by-step guide (with screenshots); direct help for anyone stuck	~10 min per person	Days 5–7
6. Closeout	Final verification report delivered; 30-day source retention begins; SPF/DKIM/DMARC confirmed healthy	None	Day 7

Risk Register (what could go wrong, and the plan for each)

RISK	LIKELIHOOD	MITIGATION / ROLLBACK
Source host throttles the bulk copy, slowing Phase 2	Medium	Batches sized to host limits; timeline padded; sync simply continues — no user impact
A folder's counts don't match at verification	Medium	Cutover does not proceed; mismatched folder re-synced and re-verified first
DNS change propagates slowly after cutover	Low	TTL lowered 48h in advance so propagation completes in minutes, not days
Mail arrives at old host during the cutover window	Low	Final delta sync sweeps anything that landed on the source after the switch
A user can't reconnect a phone/Outlook profile	Medium	Illustrated per-device guides provided; direct written support until everyone is connected
Cutover must be abandoned mid-window	Low	MX records reverted to source (kept on file from Phase 0); mail continues on old system; retry rescheduled

Verification Checklist (signed off before the project closes)

- Per-mailbox, per-folder item counts: source = destination (report attached to closeout)
- Inbound mail from 3 external providers (consumer and business) lands correctly
- Outbound mail passes SPF, DKIM, and DMARC (verified from real message headers)
- Calendar items intact — recurring events specifically spot-checked
- Every user confirmed connected: Outlook desktop + mobile
- Old system untouched and retained 30 days as a safety net
- Plain-English closeout doc delivered: what changed, what's where, who to call for what

What the client approves before anything moves: this plan, the cutover window date/time, and the license selection. No surprises is the deliverable.